



Getting Started Guide
for in-house staff

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Introduction

Welcome to the MR Web 8 Getting Started Guide for office staff

This guide is for office personnel who are in charge of setting up and maintaining your MR Web 8 online offices. It contains instructions for configuring and customizing your MR Web 8 for your company. It also contains instructions for managing and monitoring your MR Web 8 after set-up. Plus it includes information on basic HTML code you will need for some customization options, and instructions for importing web requests into MR8.

MR Web 8 works with your MR8 office management system, and it is in your MR8 system that you will find the tools described in this guide.

For information on using MR Web 8 online offices, please refer to the MR Web 8 online office user guide for attorneys, paralegals and other clients. This guide is available as a PDF download from our website: www.omti.com/mr

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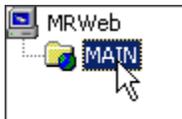
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Web Site Configurations

Configuring MR Web 8 options

Before you can make MR Web 8 available to your clients, there are settings you must configure and defaults you need to customize. Preferences entered here apply to the entire web site.

1. On the menu bar in MR8, click **Tools > Web > Site Configurations**.
2. On the left side of the window, folders appear representing the MR Web 8 sites. Normally, you will see only one folder (“MAIN”), unless you purchased additional MR Web 8 licenses connected to the same MR8 database. Click the name of the web site you want to configure.



3. Click the **General** tab and specify the following information:
 - **Client Site URL** – Not an input field. The value is set at the time of installation by OMTI.
 - **Product Version** – Not an input field. The value reflects the version of MR Web 8 that you are currently using.
 - **Company Site URL** – Enter your company’s main web site address here. When your company’s logo is clicked within MR Web 8, the user will be redirected to the specified web site.
 - **Contact Email** – Not used in MR Web 8. Leave this field blank.
 - **Maximum Logon Count** – This field specifies how many successive log-in attempts users can make before they are locked out. After the specified number of attempts has been made, the user’s account will be locked out. (See “Unlocking locked-out accounts.”)
 - **Activity Log Service** – To track activities on your MR Web 8, select Enable in the drop-down. (See “Tracking MR Web 8 activities.”)
4. Click the **Cobranding-Content** tab and enter text that will appear on the log-in page for clients. You can also specify the size, color and style of the text. These fields support HTML, so you can insert HTML codes (tags) to format the content. (See “Working with HTML.”)

| Client Login Page | |
|-------------------|--|
| Title: | Welcome to your online office. |
| Description: | Come here whenever you need quick access to your order status, invoices, records and n This site works with Internet Explorer or Firefox on Windows, and Firefox on Macs. |

- Click the **Cobranding-Others** tab. Click the color palette button next to each section and select a color to co-brand your MR Web 8 with your company web site's look and feel.

| | | |
|---------------------------------|----------------------|---|
| 1. Login Page Input Line Color | <input type="text"/> |  |
| 2. Login Page Input Label Color | <input type="text"/> |  |

- The settings in the **Skin/Grid** section are reserved for future use. MR Web 8 does not utilize them at this time.
- Click the **Web Mail** tab and specify the following information:
 - Sender's Display Name** – Enter a name to use for sending an automatic response when a client orders online. This name will be displayed as the sender (From) in the email.
 - Sender's Email** – Enter an email address to use for sending an automatic response when a client orders online.
 - SMTP Server** – *Simple Mail Transfer Protocol (SMTP)* is a common protocol that is used to send email messages across the Internet. The best way to find the information about your SMTP server is to ask your Internet service provider (ISP). You can also get it from your email program such as *Microsoft Outlook* (see Tip below).
 - Port Number** – The default number is 25. If you use a different port number for SMTP email routing, enter it here.
 - This server requires a secure connection (SSL)** – If you are using SSL on your SMTP server, select Yes in the drop-down. If not, select No.
 - SMTP Account Name/Password** – Enter any valid email account name and password that are set up on your SMTP server.

**TIP**

To get the information about your SMTP server from *Outlook*:

- On the **Tools** menu in *Outlook*, click **E-mail Accounts**.
- Select **View or change existing e-mail accounts**, then click **Next**.
- Select your ISP account, then click **Change**.

Under **Server Information**, the **Outgoing mail server (SMTP)** field contains the server name.

- Click the **Online Orders** tab and specify the following information:
 - City** – Enter the default city to be displayed when the client is entering a new order request.
 - State** – Select the default state to be displayed when the client is entering a new order request.
 - Auto-Reply** – Select Yes to send an automatic email response when an order request is received.
 - Subject** – Enter text that will appear in the Subject line when automatic response emails are sent.
 - Message Header** – Enter text that will appear in the Message field as the header of automatic response emails. The body of the message will contain all of the details of the order request. This field supports HTML, so you can insert HTML codes (tags) to format the header. (See “Working with HTML.”)

- **Message Footer** – Enter text that will appear in the Message field as the footer of automatic response emails. This field supports HTML, so you can insert HTML codes (tags) to format the footer. (See “Working with HTML.”)

| Auto-Reply Email Settings | |
|---------------------------|--|
| Auto-Reply: | Yes |
| Subject: | AutoReply: Online Order Notification |
| Message Header: | This automatic notice is in response to your recent records request. |
| Message Footer: | This e-mail contains proprietary information and may be confidential. If you are not the intended recipient of this e-mail, you are hereby notified that any dissemination, distribution or copying of this message is strictly prohibited. If you received this message in error, please delete it immediately. |

- **Users to Notify** – Click **Add**. In the Lookup Users windows, select users who should be notified (via MR8’s Message Center) when new order requests are received.
8. Click the **Repository** tab and specify the following information:
 - **Subject** – Enter text that will appear in the Subject line when repository notification emails are sent.
 - **Message Header** – Enter text that will appear in the Message field as the header of repository notification emails. This field supports HTML, so you can insert HTML codes (tags) to format the header. (See “Working with HTML.”)
 - **Message Footer** – Enter text that will appear in the Message field as the footer of repository notification emails. This field supports HTML, so you can insert HTML codes (tags) to format the footer. (See “Working with HTML.”)
 9. Click the **Business Units** tab and specify the following information:
 - **Business Units Access for Contacts** – Click **Add**. In the Lookup Business Units window, select all of the business units that clients should have access to when using this web site. Normally, you select all of your business units, unless you purchased additional MR Web 8 licenses connected to the same MR8 database. Highlight the main business unit, then click **Set as Default**. The default business unit is displayed when the client is entering a new order request. (See Best Practices below.)



BEST PRACTICES

If you have multiple business units (branch offices), it will be difficult for clients to choose the right business unit when they are entering order requests. For that reason, it is recommended that you create a dummy business unit called *Web Order* and make it the default business unit.

Back in the office, the order processing staff will make a determination as to which business unit should handle the request.

10. Click the **Accessibility** tab. Check the **Allow** box for any options you want to grant to users.
11. Click the **News** tab. In the **Client News** field, enter text that will appear in the My Web > News area for the clients. This field supports HTML, so you can insert HTML codes (tags) to format the news. (See “Working with HTML.”)

12. Click the **Attention** tab. Click **Add**. In the Lookup Steps window, select tracking steps that should be displayed in the **Attention** tab of MR Web 8.



- **Contact** – Under Attention, open orders that require the client’s attention are listed. The client can click **Send Message** next to the case coordinator’s name to send a quick message instructing him or her how to proceed with the order. Select who that person should be in the **Contact** drop-down.
13. Click **Reset Password** to customize the automatic emails that are sent when clients or resources click the **Forgot Password** button on MR Web.
- **Email settings for Forgot Password:**
 - **Subject** – Enter text that will appear in the Subject line of “Forgot Password” emails.
 - **Body** – Enter text to appear in the body of “Forgot Password” emails. This field supports HTML, so you can insert HTML codes (tags) to format the content. (See “Working with HTML.”) Add RB8 data fields to the body by clicking **Actions > Add Data Field** and select the desired data field.
 - **Other options.** If you want to force users to update their passwords periodically, select Yes in the **Enforce reset password** drop-down. Then:
 - Select a time limit per password in the **Duration for set password** drop-down.
 - If you will allow users to continue using the same password, select Yes in the **Allow same password as current** drop-down.
14. Click **Save**.

COD Invoices

Publishing COD invoices

In MR8, COD invoices are not posted, so as a default, they do not appear when clients go to the Activity section of MR Web. However, with MR Web's e-commerce module, you have an option to 'publish' COD invoices to allow the clients to pay for and download transcripts that were billed COD.

1. On the menu bar in MR8, click **Billing > Cod Invoices**.
2. In the Search Criteria pane, specify the filters, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the COD invoices that meet the specified search conditions. Right-click the invoice(s) you want to publish on MR Web, then choose **Set Publish on Web**.

| Invoice No. | Invoice Date | Invoice Amount | COD | Publish on Web |
|-------------|--------------|----------------|-------------------------------------|--------------------------|
| 7350 | 8/11/2009 | 452.65 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7348 | 7/27 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7346 | 7/14 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7344 | 7/10 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7342 | 7/7 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7335 | 6/25 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7333 | 6/23 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7318 | 5/18 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7300 | 4/23 | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

**NOTE**

To 'unpublish' COD invoices, right-click the invoice(s) you want to unpublish on MR Web, then choose **Clear Publish on Web**.

Accessibility

Controlling online transcript access

Before e-commerce was available, any client who was billed for transcripts was able to download transcripts from MR Web whether invoices were paid or not unless invoices were marked COD. With e-commerce now built into MR Web, you can restrict downloads to only those transcripts that are fully paid for.

1. On the menu bar in MR8, click **Tools > Web > Site Configurations**.
2. Click the **Accessibility** tab.
3. In the Contact Module section, under Repository, there are two checkboxes:
 - **Allow download of paid records only** – Check this box if invoices must be fully paid before transcripts can be downloaded. This can help to improve your collections, because attending attorneys will have to pay first before getting a transcript.
 - **Always allow downloads for scheduling client** – Check this box if the invoices for clients initiating jobs do not have to be fully paid before transcripts can be downloaded. Since scheduling clients are normally your good clients, you might want to check this box so as not to irritate your client base.
4. Click **Save**.

Contacts

Unlocking locked-out accounts

An account (for MR Web 8 login) can get locked out due to multiple log-in failures. The office must unlock the account before a contact can use it again.

1. On the menu bar in MR8, click **Setup > Contacts**.
2. Search for the contact whose account has been locked out.
3. Right-click the contact, then choose **View**.
4. Click the **Additional** tab.
5. Uncheck the **Account is locked out** box.



6. Click **Save and Close**.

Web Activity Log

Tracking MR Web 8 activities

If you have enabled the Activity Log Service, MR8 will keep track of activities by clients on MR Web 8. The activity log will show you which sections of MR Web 8 are popular and who is using the web site.

1. On the menu bar in MR8, click **Tools > Web > Web Activity Log**.
2. In the Search Criteria pane, **Site** defaults to MAIN and the **Activity Date** range defaults to the current month. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the web activities that meet the specified search condition(s) as a report.

| Contact Module | | | | | | | |
|-------------------|--------|-----------|----------------|----------|------------|----------------|---|
| Contact | Log In | Attention | Order Progress | Activity | Repository | Download Files | |
| ▶ Larry Shoemaker | 1 | 1 | 0 | 0 | 0 | 0 | 0 |
| Daniel Berg | 1 | 1 | 0 | 0 | 0 | 0 | 0 |

Import Web Requests

Importing online orders

When clients place orders online thru MR Web 8, you will be alerted via the Message Center. Once you import the requests into MR8, the order status will change from “*Request New*” to “*New*.”

1. On the menu bar in MR8, click **Tools > Web > Import Web Requests**.
2. In the Search Criteria pane, click **Search** (without specifying any search filters) to bring up all of the requests to be imported.
3. Right-click the request you want to import (at the top grid), then choose **Import**.
4. In the Import Case window, click each of the four tabs—**General**, **Records Of**, **Additional Info** and **Forms**—to verify and update the information entered by the client.
5. Click **Save and Close**.

Import Web Requests

Importing parties, files and locations

Once the order has been imported, the next step is to import the rest of the data—parties, files and locations—that the client has submitted.

1. With the order highlighted at the top grid, click the **Parties** tab (located at the bottom grid).
2. Right-click the scheduling contact (usually the first row), then choose **Import**.
3. Right-click any of the remaining contacts, then choose **Import**.
4. In the Import Case Party window, click the binoculars button to search for the contact using the information shown in the Web Request pane. If the contact is not found, click **New** to add.



5. Complete the rest of the applicable fields for this contact. (See “Entering parties” in MR8 User Guide.)
6. Click **Save and Close**.
7. Repeat steps 3 through 6 until all parties are gone from the grid.

8. Click the **Files** tab.
9. Right-click the file you want to upload to the repository, then choose **Import**.
10. In the Import Repository window, select a file type in the drop-down and complete any other applicable fields. (See “Uploading files” in MR8 User Guide.)
11. Click **Save and Close**.
12. Repeat steps 9 through 11 until all files are gone from the grid.
13. Click the **Locations** tab.
14. Right-click the location you want to import, then choose **Import**.
15. In the Import Part window, click the binoculars button to search for the location using the information shown in the Web Request pane. If the location is not found, click **New** to add (see Note below).

| Name | Value |
|----------------------|---------------------------|
| Location Info | |
| Name | Manually entered location |

16. Complete the rest of the applicable fields for this location. (See “Creating new work orders” in MR8 User Guide.)
17. Click **Save and Close**.
18. Repeat steps 14 through 17 until all locations are gone from the grid.

**NOTE**

If the client has used the **Lookup Location** button and found the location in your MR8 database, you do not have to click the binoculars button to search for the location again. In that case, the Web Request pane will not appear in the Import Part window.

Lookup Location

Appendix

Working with HTML

A web page is simply a text document that contains instructions for web browsers. If you look at a typical web page in a regular text editor, you see a bunch of code in angle brackets and a bunch of text; it's not very exciting. However, when a web browser "sees" a web page, it uses these bits of code, called *tags*, to interpret how the document should look and what is to happen when certain things are clicked on.

Hypertext Markup Language (HTML) is the predominant markup language for web pages. HTML is written in the form of tags, surrounded by angle brackets (<>). It is beyond the scope of this guide to cover HTML in its entirety. Here are minimal basics you should know to format message headers and footers for MR Web 8.

General Rule

HTML tags consist of a left angle bracket (<), followed by name of the tag and closed by a right angular bracket (>). Tags are usually paired. The ending tag looks just like the starting tag except a slash (/) precedes the text within the brackets.

Forced Line Breaks

The
 tag forces a line break with no extra space between lines. (By contrast, most browsers format the <P> paragraph tag with an additional blank line to more clearly indicate the beginning the new paragraph.)

Character Formatting

| | |
|-----|-------------|
| | Bold text |
| <I> | Italic text |

Linking to Other Documents

The chief power of HTML comes from its ability to link regions of text (and also images) to another document. The browser highlights these regions (usually with color and/or underlines) to indicate that they are hypertext links (often shortened to *hyperlinks* or simply *links*).

HTML's single hypertext-related tag is <A>, which stands for *anchor*. To include an anchor in your document:

1. Start the anchor with <A.
2. Specify the document that's being pointed to by entering the parameter **HREF="filename"** followed by a closing right angle bracket.
3. Enter the text that will serve as the hypertext link in the current document.
4. Enter the ending anchor tag: .

Example 1: Repository notification message header

Copy the tags shown in bold and substitute your own company information to create your repository notification message header.

****OMTI Court Reporting **
**

The following files are available from ****our web site****.

OMTI Court Reporting

The following files are available from [our web site](#).



NOTE

The text, target=_blank, in the <A> tag tells the browser to open a new window when the hyperlink is clicked.

Example 2: Repository notification message footer

Copy the tags shown in bold and substitute your own company information to create your repository notification message footer.

If you don't know your login information, contact ****support@omti.com****.

If you don't know your login information, contact support@omti.com